

YOUR TENTATIVE TAX APPOINTMENT IS:

DATE: _____ TIME: _____ A.M. P.M. PLACE: _____

Your Appointment is TENTATIVE- Please Contact Our Office to Confirm Your Tax Appointment. (Satellite locations on reverse side)

As we enter yet another tax season, we hope 2017 has been a wonderful year. Please welcome back Ashley Petrie, EA! As many of you may remember, Ashley was a member of the Pel & Associates Team for 6 years until 2014. She has since advanced in her career toward becoming a CPA. She should receive that designation in the coming months. We are thrilled to have her back this year to assist with Correspondence Returns. Dr. Paul McReynolds, EA will also be returning. We are blessed to have such a great team of experts!



Ashley with her husband Daniel and son Asher

Please bring the following forms with you included in this mailing:

- ✓ Tax Organizer- A discount will be offered for completed organizer
- ✓ Questionnaire
- ✓ Engagement Letter
- ✓ Care Plan (optional)

Some Tax Organizer Tips:

- **Preparation:** Please come prepared and add up all tax receipts **IN ADVANCE.**
- **Check W-2's and 1099's:** Please check for accuracy **BEFORE** your appointment.
- **If you sold stock:** Make sure to bring your 1099-B Forms **AND** the cost basis information.
- **If you sold a home:** Please bring closing statements for the purchase and sale.
- **Please bring any forms 1095-A, 1095-B, 1095-C received.** These forms include important information we need relevant to the Affordable Health Care Act.
- **Please make note:** The IRS Standard Mileage rates for 2017: Unavailable at the time of printing. Check our website for updates.
- **DMV Fees:** Remember, only the license fee, based on the value of the vehicle, is deductible on your tax return. For California vehicles, the deductible portion is listed on the bill as "License Fee" with the verbiage, "This may be a tax deduction" next to it. Please have this information available at your tax appointment. You can also check out the DMV website at www.dmv.ca.gov for more information.
- **Medicare Premiums:** In the medical section of the 2017 Tax Organizer, please indicate if you have included your Medicare premiums as part of your insurance premiums. We want to make sure we are not duplicating this information as it is reported on your Social Security Statement (Form 1099-SSA).
- **State Estimated Payment:** If you had a large increase in income during 2017, it might be wise to make your state tax payment before December 31, 2017. The amount may be deductible on your federal return as an itemized deduction. (Sorry, the federal tax payments are not deductible on the state return). To verify that a pre-payment of State income tax would be of benefit to you, please call the office.
- **SPECIAL NOTE FOR MINISTERS:** **Establishing your 2018 Housing allowance.** Remember, your housing allowance should be established each year and in advance. This firm recommends that you establish your 2018 housing allowance in December. If you have any questions, or would like some guidance in this area, please give us a call.

Sending in Tax Documents- Correspondence Returns

Mail: P.O.Box 400, Los Alamitos, CA 90720

Cloud Cabinet: Our secure web-based system that provides each client with their own username and password. Your tax documents can be uploaded and stored along with your tax return. Call the office to get started today!

Fax: 866-279-4916

Email: admin@pelandassociates.com

For your security, we do not recommend sending any private information via e-mail.

Detailed Organizers Available

If you would like to receive a more detailed organizer that lists last year's information alongside space to enter in this year's information, please call or e-mail the office. We will get one out to you right away.

We Appreciate Your Referrals

Your confidence in us means everything. If you know of someone seeking tax or financial advice, please pass along our number. A good referral is the best compliment.

Additional Fees:

Delayed Receipt of Initial Documents-

- Initial information received after March 15 = \$25
- Initial information received after April 1 = \$50

This does not include additional documents we request to complete the return.

Appointments After April 1- For all tax appointments scheduled on or after **April 1** the additional fee will be **\$25**.

Information and documents received in April may require the filing of an extension. The tax extension will allow us adequate time to thoroughly and accurately prepare your return. *It is imperative that we have your information as soon as possible, so please do not delay!*

Extension Deposit- In order to request the filing of an extension clients must sign an Extension Agreement and pay a \$25 deposit that will go toward the cost of the tax return. (This is not an additional fee.) Please contact us for more information.

Tax Interview Dates and Cities ("Satellite" Locations): Satellite locations have **limited availability**. Please call soon to reserve your appointment or to be put on a waiting list for your desired date.

Alta Loma- March 6 (Tues)

Beaumont- Feb 17 (Sat)

Corona- Feb 3 (Sat), Feb 20 (Tues)

El Toro- Feb 27 (Tues)

Hemet- Feb 6 (Tues)

Moreno Valley- Jan 27 (Sat)

Pilgrim Place Homes

(for Pilgrim Place Residents ONLY)

Feb 22 (Thurs) March 1 (Thurs)

March 20 (Tues) March 29 (Thurs)

Rancho Cucamonga

Feb 13 (Tues) March 15 (Thurs)

Riverside- Feb 1 (Thurs), March 3 (Sat)

San Dimas- Feb 15 (Thurs)

San Juan Capistrano- Feb 8 (Thurs)

Tujunga- March 13 (Tues)

Victorville- March 8 (Thurs)

MERRY CHRISTMAS AND HAPPY NEW YEAR!

*Kari L. Pel, EA, CFP® Dr. Paul McReynolds, EA Ashley Petrie, EA
Holly Sherman Mary Steiner Alice Pacey*